

The Broker Portal **DOCUMENTS GUIDE**



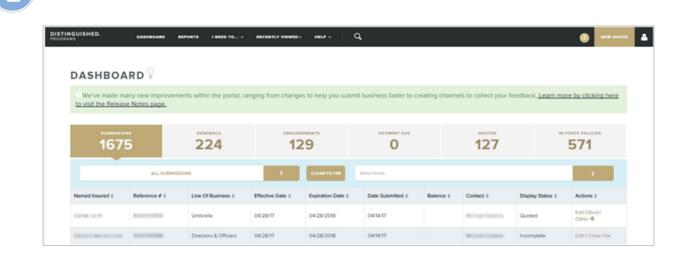


Document Retrieval

Through the Broker Portal, you can view and save documents associated with your account(s). Open an account, click "All Documents" and you'll find documents related to that account. Follow the steps below to locate your policy and all associated documents.

You will find the following types of documents within the portal:

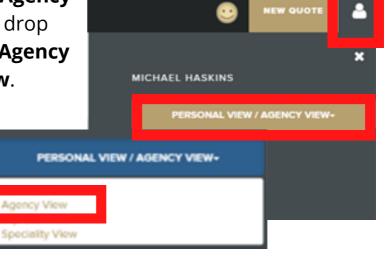
- Policies
- Invoices
- Quotes
- Completed Applications
- Cancellation Notices
- Rescission Notices





To see all accounts toggle to **Agency View**. From the account icon drop down, click **Personal View / Agency View** and select **Agency View**.

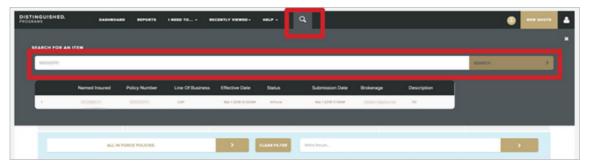
Go to the **Broker Portal Dashboard**.



(m) **DISTINGUISHED** SELF-SERVICE



Click the **magnifying glass** to search for your **Submission** or **Policy**.





Click View Policy to open your **submission** or **policy**.

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SELF-SERVICE



Click **All Documents** and sort the list to find what you need.

• Click the **Creation Date** sort button twice to pull up the most recent date.

PROGRAMS	UISHED. DASHBOARD	REPORTS	I NEED TO	RECENTLY VIEWED - HELP -	Q		
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	Find a file			>			
	Ni o o			Policy Number 0	Policy Term 0	Creation I te 0	Actions 0
	Quote pdf			Automatical (***)	2018-03-01 to 2019-03-01	2018-03-01	Download File
	Invoice pdf			Accession (1997)	2018-03-01 to 2019-03-01	2018-03-01	Download File
	Policy - Specialty Cover Letter	pdf		\$111111111111111111	2018-03-01 to 2019-03-01	2018-03-01	Download File
	Ballan Markada				D040 03 041- 3040 03 04	2040.02.04	Barrata and Edu



Choose your document and click **Download File**.

		RECENTLY VIEWED - MELP -	Q.		
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